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ABSTRACT

Chief state school officers in all 50 states were surveyed to gather information regarding the various states' funding arrangements for small and/or isolated rural schools and to develop a financial planning tool for use by state legislators and boards of education. Data were gathered from every state except Hawaii. Twenty-eight states had some arrangement for special funding for isolated rural and/or small schools. Although the plans were diverse, they usually addressed program eligibility and assistance mechanisms. Among eligibility factors, enrollment levels were a key element of the program in 16 states. Six states considered number of teachers or instructional units, six focused on population density, nine looked at isolation from other schools, and two addressed the rural district's minimum financial contribution. Despite great variety, assistance mechanisms in the 28 states generally fell into three categories: added weightings to the basic support formula (13 states); minimum support levels (5 states); and size adjustments and special payments (6 states). Completing the study is a detailed explanation of each state's funding arrangement. Definitions, statutes, and formulas are included to describe eligibility considerations and assistance mechanisms. (SB)

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SPECIAL FUNDING for SMALL and/or ISOLATED RURAL SCHOOLS



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SPECIAL FUNDING
for
SMALL and/or ISOLATED RURAL SCHOOLS

by

Lyle O. Wright

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CONTENTS

	Page
OVERVIEW AND SUMMARY	1
Overview	2
Problem	2
Purpose	2
Methodology	2
Summary of Findings	4
Eligibility	4
Assistance	8
Table 1, Summary of Small School Funding	11
FINANCING IN INDIVIDUAL STATES	12
Alaska	13
Arizona	14
Arkansas	15
California	16
Colorado	17
Georgia	19
Idaho	22
Kansas	25
Kentucky	26
Maine	26
Minnesota	29
Montana	31
Nebraska	33
Nevada	33
New Mexico	35
North Carolina	36
North Dakota	36
Oklahoma	36
Oregon	37
Pennsylvania	38
South Dakota	39
Texas	41
Utah	44
Virginia	45
Wyoming	46
ABOUT THE AUTHOR	47



OVERVIEW & SUMMARY

OVERVIEW

Problem

Small and/or isolated rural schools have long faced funding inequities which have adversely affected educational quality in those schools. These problems are primarily caused by low efficiency with small numbers of students and high transportation costs due to busing long distances. A number of states have sought to correct these problems; using a variety of approaches in their efforts. Some states are now seeking to create new approaches which will more fully provide what is needed by the rural schools.

Purpose

This study has been designed to develop a planning tool to provide informational input for states as they revise or initiate special funding for small and/or isolated rural schools. Specifically, the purpose has been to bring together information regarding funding arrangements made for rural schools by the various states. It is hoped that this will provide a variety of ideas to aid in planning future action to be taken by state legislatures and state boards of education.

It should be noted that this is not an exhaustive study, since available resources are not sufficient for going into greater depth at this time. Where further information is desired, it should be sought from specific states.

Methodology

A simple survey form was prepared and sent as a request from Dr. Walter Talbot, Utah's Superintendent of Public Instruction, to the chief

state school officers of the other 49 states (see Appendix A for a sample). One follow-up letter of reminder was sent to those few states from which responses had not been received as the results were initially synthesized. The ultimate response has been unusually high for a mail survey, with 48 states (96%) returning the form.

Responses are summarized below, showing whether or not the states have any kind of special funding arrangements for small and/or isolated rural schools:

	<u>Special funding</u>	<u>No special funding</u>	<u>Total</u>
State responses	23	25	48
ECS (Education Commission of the States) report*	1		1
Subtotals	24	25	49
States indicating "no special funding" on the response, but with some arrangements in their regular funding formulas (Connecticut, Rhode Island, Virginia, Wyoming)	4	-4	
TOTALS	28	21	49

The ECS report* indicates that Florida has special assistance provisions, which are unfunded.

No information is readily available on Hawaii.

*Information about the state of Washington has been obtained from a June 20, 1980 memorandum from Allan Odden, Director of the Education Finance Center at the Education Commission of the States (ECS), Denver, Colorado to the New York State Special Task Force on Equity and Excellence in Education, Table A3, Summary of Rural, Sparsity, Small Size Adjustments. The source listed therein is "School Finance at a Fourth Glance." Denver: Education Finance Center, ECS, 1979.

SUMMARY OF FINDINGS

Although there is great diversity in the rural funding programs of the various states, some patterns are discernible. Elements of state plans fall generally into two categories: (1) eligibility -- the guidelines or requirements by which it is determined that a school or a school district is eligible to receive special assistance; and (2) assistance -- the methodology and formulas by which that special aid is allocated to eligible schools and districts.

Eligibility

Eligibility factors include student enrollment, instructional units, and/or number of teachers, population density/sparsity, isolation, and effort. In many cases, several of the elements are interrelated.

Enrollment

Most of the states offering special assistance to rural schools include enrollment as a key element in determining eligibility, in the ways described below:

Four states have a district level enrollment factor. Special aid is provided by Arkansas for districts with less than 350 students, by Texas for districts with fewer than 1,000 students, by California for districts with 2,500 or less in average daily attendance, and by New Mexico for districts with fewer than 4,000 average daily membership (ADM).

Two states have established multiple enrollment categories covering both elementary and secondary schools. Arizona has two levels, for schools with 0-100 pupils, and for schools with 101-500 pupils. Kansas has four levels, for enrollment of under 200, from 200-399, from 400-1,599, and 1,600 and over.

States with a single enrollment number for school eligibility include New Mexico, less than 200 ADM; Colorado, below 175 enrollment; and Oregon, less than 100 ADM.

For elementary schools given a separate factor, North Carolina sets the requirement at 100 pupils or less; Washington at less than 100 pupils; Maine at 25 or less; Minnesota at less than 20; and South Dakota at 5 pupils or less. For high schools, North Dakota has established a guideline at 550 pupils or less; Minnesota at less than 500; Washington at less than 250; North Carolina at 60 pupils or less; and South Dakota at 35 pupils or less.

Maine has an additional category, which provides special aid to schools of 25 or less pupils where their district contracts the education of all students with a neighboring district.

Number of Teachers or Instructional Units

Special aid is furnished to one-teacher schools by Kentucky, North Dakota, and Wyoming. Arizona provides additional aid to schools with four teachers or less. Georgia makes special provisions for elementary schools with less than six teachers and for middle or secondary schools with less than ten teachers. Alaska provides special aid for a district eligible for less than 25 instructional units (IU's) of state aid.

Population Density or Sparsity

Kansas has a cost-density formula which it applies to determine the amount of state aid for transportation. Nebraska's eligibility requirements include a population of less than four persons per square mile. Nevada's assistance is guided by tables which include sparsity factors. Oklahoma bases its transportation assistance on a factor obtained by dividing the "average daily haul for the next preceding year" by the "area served for the same period." Pennsylvania has established an eligibility requirement

of less than 50 population per square mile and a modified sparsity factor of 50 to 100 population per square mile. Texas utilizes categories of districts having an area less than 300 square miles, and those having more than 300 square miles, tied to its enrollment eligibility of 1,000 or less.

Isolation

Several states have established specific distances from other schools as part of their eligibility package:

Colorado requires a qualifying educational center to be at least 20 miles from any similar center.

Idaho specifies that, for schools classified as "separate," a kindergarten or elementary school must be 10 miles and a secondary school 15 miles from the nearest similar school, and that a kindergarten or elementary school must also be 10 miles from the superintendent's office.

Oregon stipulates, when sparsity of population is used as a factor of eligibility, that an elementary school must be more than 10 miles and a high school must be more than 15 miles from any similar school by the nearest traveled road.

Minnesota requires that an eligible elementary school must be at least 50 miles by usual traveled routes from the nearest Minnesota elementary school.

One of Georgia's alternative isolation factors requires that an eligible school must be more than 40 miles from a similar school.

Maine leaves to its Commissioner of Education the determination of whether a school is an "unreasonably long distance from another unit."

Alternative Isolation Criteria Are Provided by Some States:

Georgia, among several alternatives, permits eligibility if it would take more than 1½ hours for the majority of students in a school to reach a school less than 40 miles away or if the school is physically blocked by water, mountains, or climatic conditions from access to another public early childhood, middle, or secondary school for at least 20 days during the school year.

Idaho permits a classification of remoteness and isolation, in lieu of meeting "separate" requirements, due to geographical or topographical conditions.

Maine allows eligibility if a school is "situated in a location which has unique problems in transporting students to another school unit."

Minnesota bases secondary school eligibility on an "isolation index of greater than 18."

North Carolina grants eligibility in cases where there are geographic conditions prohibiting consolidation.

Pennsylvania provides that distance and road conditions must make transporting children unfeasible.

Utah provides for isolated schools to be eligible for special aid by classifying them as "necessarily existent small rural schools."

Effort

Some states require that districts meet a minimum financial effort in order to be eligible for special assistance to small schools. For example:

Arkansas requires that eligible districts levy mill rates at least equal to the state average for the previous year.

In Kansas, the "local effort rate (LER)" is a part of calculations for special aid.

Assistance

The mechanisms for allocating financial assistance to eligible schools and districts vary considerably from state to state. It appears feasible, however, to synthesize these mechanisms into three primary groupings: added weightings for basic support, minimum support levels, and size adjustments--including special payments.

Added Weightings for Basic Support

The most common method used by states to give extra assistance to small and/or isolated schools is to find creative ways to add a little extra to the basic support formula. These methods include:

Alaska - special formulas for rural and isolated schools.

Arkansas - ADM increased by specific percentages.

Arizona - Support Level Weights are adjusted for low enrollments.

Colorado - provides a system of "bonus pupils" for schools with low enrollments, adding a specified amount of funding for each such bonus pupil.

Kansas - the four enrollment categories determine the "budget per pupil (BPP)."

Nebraska - there is a 10% increase where the population density is at least three per square mile but less than four, a 20% increase for a density of at least two but less than three, a 30% increase for a density of at least one but less than two, and a 40% increase for a population density of less than one person per square mile.

Nevada - tables of basic support are based on the state's eligibility factors.

New Mexico - formulas provide for additional program units to small schools.

North Dakota - high schools with 550 pupils or less are given 0.50 extra weighting per pupil; one-teacher elementary schools have a 1.30 weighting; and "small" elementary schools are weighted between 0.90 and 1.00.

Oregon - formulas and tables provide a "small school correction" concerning the number of teachers.

Pennsylvania - payment is made above basic aid for "expenditures in excess of \$400 per subsidy-weighted average daily membership, not to exceed \$250."

South Dakota - classroom unit entitlements are calculated from factors varying with the ADM.

Utah - formulas and tables adding Weighted Pupil Units (WPU's) to the basic aid received by eligible schools.

Minimum Support Level

Several states set minimum support levels, so that schools with low enrollments are granted more than they would have earned under the regular formula. These include:

Georgia - isolated schools with grades 1-12 are guaranteed a minimum of nine "state allotted teachers"; those with grades 1-7 are guaranteed a minimum of seven teachers.

Idaho - tables specify minimum support units.

Kentucky - one classroom unit for each isolated one-teacher school with twelve or more ADA; one classroom unit for each 25 ADA at other isolated schools. (normal classroom unit is for 27 ADA).

South Dakota - one classroom unit for each one-teacher school regardless of enrollment; two classroom units for a two-teacher school.

Washington - one classroom unit for each one-teacher school.

Size Adjustment

In some states, provisions are made for special financial grants or additional allowances to small and/or isolated schools, including the following:

Connecticut - multi-town regional K-12 districts receive an additional grant of \$25 per pupil.

Maine - Commissioner is authorized to make adjustments to "meet educational needs" of isolated schools, with some statutory guidelines provided.

North Carolina - State Board of Education allotments are available for small schools.

Texas - formulas provide for adding "personnel units" based on size and sparsity.

Washington - additional certificated staff units are allocated to small, remote schools.

Wyoming - \$75 per pupil in isolated schools.

The summary for each of the states is given in Table 1.

TABLE 1
SUMMARY OF SMALL SCHOOL FUNDING

STATE	RESPONSE		SPECIAL FUNDING		ELIGIBILITY FACTORS					ASSISTANCE		
	yes	no	yes	no	Pup-ils	No. Tchrs	Pop. Spars	Isol-ation	Eff-ort	Weight-ing	Min. Sup.	Size Adjust.
AL	X			X								
AK	X		X		X			X		X		X
AZ	X		X		X	X				X		
AR	X		X		X			X	X	X		
CA	X		X								X	X
CO	X		X		X			X		X		
CT	X			X								
DE	X			X								
FL	X			X								
GA	X		X			X		X			X	
HI		X										
ID	X		X		X			X			X	
IL	X			X								
IN	X			X								
IA	X			X								
KS	X		X		X		X		X	X		
KY	X		X					X		X		
LA	X			X								
ME	X		X		X			X				X
MD	X			X								
MA	X			X								
MI	X			X								
MN	X		X		X			X			X	
MS	X			X								
MO	X			X								
MT	X		X		X							
NE	X		X				X			X		
NV	X		X		X		X			X		
NH	X			X								
NJ	X			X								
NM	X		X		X					X		X
NY	X			X								
NC	X		X		X			X				X
ND	X			X								
OH	X			X								
OK	X		X				X					X
OR	X		X		X		X	X		X		
PA	X		X				X			X		
RI	X			X								
SC	X			X								
SD	X		X		X			X		X	X	
TN	X			X								
TX	X		X		X		X					X
UT	X		X					X		X		
VT	X			X								
VA	X			X								
WA		X	X		X						X	X
WV	X			X								
WI	X			X								
WY	X		X			X		X			X	X

FINANCING IN INDIVIDUAL STATES

ALABAMA

No special provisions for small rural and/or isolated schools.

ALASKA

Eligibility

Alaska's system of school finance is complex because of its unique organizational arrangements. The bulk of Alaska has not yet been organized into cities and boroughs (a borough is roughly the equivalent of a county), and remains in what has been called "the unorganized Borough." Now, in addition to over 30 regular school districts, Alaska's State-Operated School System was dissolved in 1976 to form 21 "regional education attendance areas," which are considered the equivalent of school districts for most purposes and all of which are, to some degree, rural and isolated. Some city school districts are also small and isolated, and some borough school districts serve small, isolated rural communities. Special provisions are made for all these instances, as well as for limited enrollments.

Assistance

Regional education attendance areas, incorporated by state law within the definition of "school district," are fully financed by the State.

"Supplemental equalization aid" provides special assistance to districts with low tax bases, and with consequently low expenditures, through a system based on expenditure, per the following from the Alaska Statutes:

Sec. 14.17.023. SUPPLEMENTAL EQUALIZATION AID. (a) In addition to basic state aid under AS 14.17.021, each district is entitled to supplemental equalization aid, as determined in (b), (c) and (d) of this section.

(b) The amount of supplemental equalization aid for a district is calculated by multiplying the ADM of the district as reported for the prior fiscal year under AS 14.17.180, by the amount per ADM calculated in (c) of this section. This amount shall be reduced by the amount of

the average local tax contributions per pupil in average daily membership for school operating costs in that district in the prior fiscal year or in the fiscal year ending June 30, 1979, whichever is higher.

(c) The amount per ADM of supplemental equalization aid is calculated as the amount equal to the average local tax contributions per pupil in average daily membership for school operating costs in the city and borough school districts in the prior fiscal year.

(d) The amount of supplemental equalization aid for each district determined in (b) of this section shall be adjusted by the district's instructional unit allotment established in AS 14.17.051.

Provisions are also made for remote schools in Alaska Statute

14.17.031(e):

The commissioner may authorize a school district operating a school in a remote area to calculate the number of instructional units to which the remote school would be entitled if that school were a separate school district and to include that number of instructional units in the total number of instructional units for the district.

Similarly, compensation for low enrollments is made through the formula for basic aid, in terms of the instructional units assigned for stipulated enrollments. The base instructional unit value for 1980-81 is \$34,935, and for 1981-82 is \$38,590.

ARIZONA

Eligibility

Enrollment is the single criterion for special assistance provided to small school districts. Two categories of assistance exist, i.e., district enrollments of 0-100 or of 101-500.

Assistance

Arizona's assistance is based on enrollment formulas known as "Support Level Weights." A "Base Support Level (BSL)" is determined for regular educational programs and special educational programs (learning disabled, seriously emotionally handicapped, educable mentally handicapped, remedial education, speech handicapped, homebound, bilingual, gifted), to

which specified factors are added for individual students qualifying for "special program support services" (vocational education, hearing handicapped, visually handicapped). Currently, the BSL for grades kindergarten through eight is 1.153; for grades 9-12 it is 1.268.

An adjustment of the Support Level Weight is made for small school districts, based on enrollments. Separate counts are made for students in kindergarten through eighth grade and for those in ninth through twelfth grades. In each case, the Support Level Weight is increased by approximately 20% when the student count is 100 or less, and is increased by approximately 10% when the student count is between 101 and 500. If the student count is 0-100 for kindergarten through eighth grades, the adjusted Support Level Weight is 1.384, an increase of .231; if the count is 101-500, the adjusted Support Level Weight is 1.268, an increase of .115. If the student count for ninth through twelfth grades is 0-100, the adjusted Support Level Weight is 1.522, an increase of .254; if 101-500, the adjusted Support Level Weight is 1.395, an increase of .127.

ARKANSAS

Eligibility

Isolated school districts and those with low enrollments are eligible for special state aid.

Assistance

The Department of Education's "Criteria for the Selection and Funding of Isolated Schools" states:

"For districts whose ADM is less than 350 and who maintain a twelve (12) grade school program the adjusted average daily membership shall be the actual ADM plus 25 percent of the first 150 actual ADM or fractional part thereof and 10 percent of the next 200 in actual ADM or fractional part thereof,

provided, however, that in no instance shall such additions cause the total adjusted ADM of any district to exceed 350." Section 2(b), Act 1100 of 1979.

"The following items shall be set aside prior to the allocation of any available Minimum Foundation Program Aid above the adjusted base aid amount: . . . (2) Seventy-five Thousand Dollars (\$75,000) for those districts designated by the State Board of Education as Isolated Districts under provisions of Act 229 of 1969; provided, that no district may qualify as an isolated district unless it votes a millage at least equal to the State average for the year previous to the year in which the allocation is made." (Section 2(c), Act 1100 of 1979. "The distance of the isolated school from an "A" rated school and road conditions between the schools must be such as to make transporting children not feasible."

CALIFORNIA

Eligibility

Relatively low revenue limits and low average daily attendance are the factors of eligibility for special provisions in California.

Assistance

Robert E. Wells, Legislative Coordinator, responding for California's Department of Education, notes that California laws currently provide two forms of specialized treatment for small school districts:

"1. Differential 'squeeze' on cost-of-living adjustments:

California's schools are funded on the basis of a revenue limit per unit of average daily attendance. These revenue limits differ between districts, and are, therefore, being equalized in response to the State Supreme Court decision in Serrano v. Priest; in other words, districts with high revenue limits per A.D.A. receive smaller annual increases than do districts with relatively low revenue limits. In order to prevent that

"squeeze" mechanism from unfairly reducing the necessarily higher revenue limits of small districts, alternative scales are provided for the smaller districts. The specifics of this formula are contained in Education Code section 42238 (recently revised by AB 2196).

"2. Excess cost allowance for districts under 2501 A.D.A.:

In recognition of the encroachment of uncontrollable items of expense into districts' budgets, Education Code section 42240 was added in 1978-80 and later amended (by AB 2196) for 1980-81. This statute provides to districts with less than 2501 A.D.A. an amount of state equal to the amount by which the district's 1977-78 or 1978-79 expenditures for home-to-school transportation exceeded three percent of the district's general fund budget in those years. This payment is made in addition to direct State reimbursements for transportation expenses, thereby allowing substantial overlap in many cases. As such, the Section 42240 allowances serve not only to offset small districts' excessive transportation, but also to provide relief from the encroachment of other expenses into those districts' budgets."

COLORADO

Eligibility

Eligibility for state equalization support funds, plus enrollment and isolation, are the criteria of eligibility for receiving additional support for small schools, termed "small attendance centers." A small attendance center is defined as an "elementary or secondary school attendance center with fewer than one hundred seventy-five pupils enrolled." For eligibility, such a small attendance center must be located twenty or more miles from any similar center.

Assistance

Assistance to small attendance centers is determined through a formula of "bonus pupils," as shown in the following excerpts from the Public School

Act of 1973:

Section 22-50-113.

(2) The number of bonus pupils for which an eligible district shall be entitled to receive small attendance center support shall be computed in the following manner:

(a) The average entitlement of the district for pupils enrolled in each of such small attendance centers, as determined through application of the provisions of section 22-50-104, computed to the nearest one-tenth whole number, shall be multiplied by the corresponding "factor" in the following table:

Elementary (Grades 1-6 or 1-8)			Secondary (Grades 7-12 or 9-12)		
<u>Attendance Entitlement</u>	<u>Factor</u>	<u>Maximum Allowed</u>	<u>Attendance Entitlement</u>	<u>Factor</u>	<u>Maximum Allowed</u>
0 - 20	Allow 24	24	0 - 25	2.0	40
20.1- 50	1.2	55	25.1- 50	1.6	75
50.1- 80	1.1	84	50.1- 75	1.5	105
80.1-115	1.05	120	75.1-125	1.4	150
115.1-150	1.04	150	125.1-150	1.2	165
			150.1-175	1.1	175

(b) If the resulting product is greater than the "maximum allowed," as set forth in the table, the number shall be reduced to the "maximum allowed."

(c) From such number shall be subtracted the attendance entitlement of the district for pupils enrolled in each such small attendance center, and the resulting number, to the nearest one-tenth whole number, shall constitute the district's bonus pupils and shall be the basis for determining the district's entitlement to receive additional state support for the operation of each such small attendance center.

Financial assistance based on the number of bonus pupils is calculated as follows:

Section 22-50-113.

(4) (a) Effective January 1, 1974, on or before the first day of December of each budget year, each eligible district shall be entitled to receive an additional amount from the state equal to the revenue base per pupil of attendance entitlement for that budget year multiplied by the number of bonus pupils for which the district is entitled to

receive additional support, or, if it be a lesser amount, an additional amount equal to:

(I) For 1974, twenty-five dollars for each bonus pupil multiplied by the number of mills levied for the general fund of the district for collection during 1974;

(II) For 1975, twenty-seven dollars for each bonus pupil multiplied by the number of mills levied for the general fund of the district for collection during 1975;

(III) For 1976, twenty-nine dollars for each bonus pupil multiplied by the number of mills levied for the general fund of the district for collection during 1976.

(IV) For 1977 and each year thereafter, the general assembly's annually specified per pupil per mill amount for each bonus pupil, multiplied by the number of mills levied for the general fund of the district for collection during that budget year.

CONNECTICUT

No special provisions for small rural and/or isolated schools.

DELAWARE

No special provisions for small rural and/or isolated schools.

FLORIDA

No special provisions for small rural and/or isolated schools.

GEORGIA

Eligibility

Georgia Education Code 32.625a.1.

Isolation is Georgia's criterion of eligibility for special assistance.

In general, the State Board of Education is charged with responsibility for defining "isolation," based upon "consideration of factors such as size of the school, school population density, surrounding road conditions to include distance by the nearest passable road to another appropriate school, climatical and geographical conditions, and such other similar factors as the board may, in its discretion, find relevant"

Under this authority, the Georgia State Board of Education, in its policy DFBC, stipulates that:

[to] be classified as an isolated school, in the meaning set forth in Georgia Code 32-625a.1 of Georgia School Laws, a school must meet all of the criteria in either Alternative A, B or C.

Alternative A

-- A middle or secondary school must earn fewer than 10 state allotted teachers.

or

An early childhood school must earn fewer than one state allotted teacher for each grade taught and must have fewer than six teachers.

-- The school is more than 40 miles by the nearest possible road from another public early childhood, middle or secondary school within the same system.

or

Another public early childhood, middle or secondary school is within the 40 miles limit, but a majority of its pupils must travel more than 1½ hours to reach that other school.

or

The school is physically blocked by water, mountains or climatic conditions from access to another public early childhood, middle or secondary school for at least 20 days during the school year.

Alternative B

An entire school system may be classified as isolated if the board of education for the system enters into a long term (25 years or more) contract for an adjoining system to provide for the instruction of the entire pupil population of the school district and if either

-- The secondary school (9-12) does not have an enrollment sufficient to allow the school to be a standard school;

or

The enrollment at the early childhood and middle school level (grades K-eight) is not sufficient to cause the school to be a standard school;

or

In the application of standards, the school has insurmountable problems which prevent the school's becoming a standard school.

Alternative C

A school system may be designated as an isolated school system provided

- The system has only one school available for each grade level and/or if the secondary school (9-12) does not have an enrollment sufficient to allow the school to be a standard school and/or if the enrollment at the early childhood and middle school level (grades K-eight)
- An effort has been made to contract with another system for the combined operation at all grade levels,
- The system is levying taxes at 20 mills on a 40 percent tax digest,
- The system has adequate facilities for the program or has outstanding bonds equal to the amount necessary to participate in state capital outlay allocations.

For those schools which meet the above criteria in either Alternative A, B or C, the State Superintendent of Schools shall be authorized to make adjustments in teacher allotments to provide a program of education that meets minimum acceptable standards. In no instance, however, will the total number of teachers allotted exceed the number required to make the school a standard school.

The state board shall act on all isolated school applications at the March regular meeting.

Assistance

Georgia Education Code 32.625a.1.

Any school with grades one through twelve, classified as an isolated school, is to have a minimum of nine "state allotted teachers." A school with grades one through seven, classified as isolated, is to have a minimum of seven "state allotted teachers." The State Board of Education has authority to establish minimum requirements and standards for the utilization of these additional teachers and the related funds provided by the state.

HAWAII

No response.

IDAHO

Eligibility

Attendance and isolation are the primary factors considered by Idaho in providing special assistance to small schools. Special provisions for smaller enrollments are included in support unit allocations in the basic funding formula. Isolation falls within the terms "separate" and remote for which the definitions are as follows:

Section 33-1001, Chapter 10, Idaho Code

8. "Separate elementary school" means a school which measured from itself, traveling on an all-weather road, is situated more than ten (10) miles distance from both the nearest elementary school within the same school district and from the location of the office of the superintendent of schools of such district, or from the office of the chief administrative officer of such district if the district employs no superintendent of schools.

9. "Separate kindergarten" means a kindergarten which measured from itself, traveling on an all-weather road, is situated more than ten (10) miles distance from both the nearest kindergarten school within the same school district and from the location of the office of the superintendent of schools of such district, or from the office of the chief administrative officer of such district if the district employs no superintendent of schools.

10. "Separate secondary school" means any secondary school which is located more than fifteen (15) miles by all-weather road from any other secondary school operated by the district.

Section 33-1001, Chapter 10, Idaho Code

3. Remote Schools. — The board of trustees of any Idaho school district which operates and maintains a school which is remote and isolated from the other schools of the state because of geographical or topographical conditions may petition the state Board of Education to recognize and approve the school as a remote and necessary school.

Assistance

Provisions for assistance to small attendance units are contained in the following excerpts from the Idaho Code:

Section 33-1002.

COMPUTATION OF KINDERGARTEN SUPPORT UNITS

28 Weeks ADA	ADA Per Unit	Units Allowed
41 or more	40.....	1 or more as computed
31 - 40.99 ADA.....	-	1
26 - 30.99 ADA.....	-85
21 - 25.99 ADA.....	-75
16 - 20.99 ADA.....	-6
8 - 15.99 ADA.....	-5
1 - 7.99 ADA.....	-	count as elementary

COMPUTATION OF ELEMENTARY SUPPORT UNITS

28 Weeks ADA	ADA Per Unit	Minimum Units Allowed
300 or more ADA.....	23.....	15
110 - 299.99 ADA.....	20.....	6
1 - 109.99.....	Units allowed as follows:	
90 - 109.99 ADA.....		6
70 - 89.99 ADA.....		5
51 - 69.99 ADA.....		4
31 - 50.99 ADA.....		3
16 - 30.99 ADA.....		2
1 - 15.99 ADA.....		1

COMPUTATION OF SECONDARY SUPPORT UNITS

28 Weeks ADA	ADA Per Unit	Minimum Units Allowed
750 or more.....	18.5.....	47
400 - 749.99 ADA.....	16.....	28
300 - 399.99 ADA.....	14.5.....	22
200 - 299.99 ADA.....	13.5.....	17
100 - 199.99 ADA.....	12.....	9
99.99 or fewer	Units allowed as follows:	
Grades 7-12		8
Grades 9-12		6
Grades 7- 9		1 per 14 ADA
Grades 7- 8		1 per 16 ADA

COMPUTATION OF EXCEPTIONAL EDUCATION SUPPORT UNITS

28 Weeks ADA	ADA Per Unit	Units Allowed
14 or more.....	14.5.....	1 or more as computed
12 - 13.99.....	-.....	1
8 - 11.99.....	-.....	.75
4 - 7.99.....	-.....	.5
1 - 3.99.....	-.....	.25

Section 33-1003, Chapter 10.

2. Application of Support Program to Separate Schools in District.

a. Separate Elementary School. — Any separate elementary school shall be allowed to participate in the educational support program as though the school were the only elementary school operated by the district.

b. Hardship Elementary School. — Upon application of the board of trustees of a school district, the state Board of Education is empowered to determine that a given elementary school or elementary schools within the school district, not otherwise qualifying, are entitled to be counted as a separate elementary school as defined in section 33-1001, Idaho Code, when, in the discretion of the state Board of Education, special conditions exist warranting the retention of the school as a separate attendance unit and the retention results in a substantial increase in cost per pupil in average daily attendance above the average cost per pupil in average daily attendance of the remainder of the district's elementary grade school pupils.

c. Separate Secondary School. — Any separate secondary school shall be allowed to participate in the educational support program as though the school were the only secondary school operated by the district.

d. Minimum Pupils Required. — Any elementary school having less than ten (10) pupils in average daily attendance shall not be allowed to participate in the state or county support program unless the school has been approved for operation by the state Board of Education.

3. Remote Schools.

... Schools which the state Board of Education approves as being necessary and remote shall be allowed adequate funding within the support program for an acceptable educational program for the students of the school. In the case of a remote and necessary secondary school, grades 7-12, the educational program shall be deemed acceptable when, in the opinion of the state Board of Education, the accreditation standard relating to staff size, established in accordance with section 33-119, Idaho Code, has been met. The final determination of an acceptable program and adequate funding in the case of a remote and necessary elementary school shall be made by the state Board of Education ...

ILLINOIS

No special provisions for small rural and/or isolated schools.

INDIANA

No special provisions for small rural and/or isolated schools.

IOWA

No special provisions for small rural and/or isolated schools.

KANSAS

Eligibility

Kansas has established four district enrollment categories which are used for (a) applying budget controls and (b) determining local effort rates. The categories are: under 200; 200 to 399; 400 to 1,599; and 1,600 and over.

A density factor is used to determine transportation assistance.

Assistance

Through a complex formula, enrollment categories determine the "budget per pupil (BPP)" allocated to each district and are also used to calculate the "local effort rate (LER)." The following details are taken from memoranda prepared for the Kansas Legislative Research Department, dated May 15, 1980:

For 1979-80, the enrollment categories and the "norm" BPP's were:

<u>District Enrollment (E)</u>	<u>Budget Per Pupil</u>	<u>Adjustment Factor</u>
Under 200	\$2,352	None
200-399	2,352	Minus \$1.705 (E-200)
400-1,499	2,011	Minus \$.376 (E-400)
1,500 and Over	1,597	None

The estimated enrollment categories and "norm" BPP's for 1980-81 are:

<u>District Enrollment (E)</u>	<u>Budget Per Pupil</u>	<u>Adjustment Factor</u>
Under 200	\$2,646	None
200-399	2,646	Minus \$1.920 (E-200)
400-1,599	2,262	Minus \$.388 (E-400)
1,600 and Over	1,797a)	None

a) \$1,806 for the four largest enrollment districts.

The formula for determining a district's LER in 1980-81 based on the second schedule above is:

$$\frac{\text{District's BPP}}{\text{BPP "Norm" for the District's Enrollment Category}} \times 1.593\%$$

The aid of a district is 100 percent of actual cost per pupil or 100 percent of the amount per pupil computed under the cost-density formula, whichever is less, multiplied by the number of such pupils (2.5 miles or more from school) transported or for whom transportation is made available as of September 15 of each year.

KENTUCKY

Eligibility

Isolation establishes eligibility for special assistance in Kentucky.

Assistance

"In allotting classroom units for elementary and secondary schools, one (1) classroom unit shall be included for each twenty-seven (27) pupils in average daily attendance in grades one (1) through twelve (12); provided, however, that one (1) classroom unit shall be included for each isolated one-teacher school with twelve (12) or more pupils in average daily attendance and one (1) unit shall be included for each twenty-five (25) pupils in average daily attendance at all other isolated schools." KRS 157.360(2).

LOUISIANA

No special provisions for small rural and/or isolated schools.

MAINE

Eligibility

Maine considers the factors of geographic isolation and enrollment in providing special financial assistance to small schools. The commissioner, with approval of the State Board of Education, determines geographic isolation "if a unit is located an unreasonably long distance

from another unit or school facility or is situated in a location which has unique problems in transporting students to another school unit." A unit qualifies for a "small unit subsidy adjustment" if, during the school year, immediately prior to the year of allocation, it operated an elementary school with 25 pupils or less in kindergarten through grade eight, or "if it is not operating an elementary school or a secondary school and has 25 pupils or less in the kindergarten through grade 8 during the school year immediately prior to the year of allocation." This latter provision is for districts with fewer than 25 pupils which contract with other districts for the education of those pupils.

Assistance

If a unit is declared geographically isolated, the commissioner is authorized to adjust the per pupil allocation to meet the educational needs of that unit, provided "the geographic isolation adjustment shall not exceed the amounts expended by the unit in the base year which were in excess of the basic elementary and secondary per pupil operating rates in the year of allocation."

A unit qualifying for a small unit subsidy adjustment because in the prior year it operated an elementary school with 25 pupils or less, "shall receive a minimum allocation for operating costs equal to $5/3$ of the state average elementary teachers' salary in the school year immediately prior to the year of allocation."

A unit qualifying with 25 students or less but not operating an elementary or secondary school "shall receive a minimum allocation computed by multiplying the elementary or secondary pupil enrollment on October 1st in the year of allocation by the state average elementary or secondary adjusted per pupil operating rate respectively or the actual cost of tuition payment in the year of allocation, whichever is less."

The small unit subsidy adjustment shall "guarantee a minimum subsidy payment for operating costs to those units which qualify" and shall be made only after other adjustments have been made.

Section 4749, Maine Code

2. Geographic isolation; determination; adjustment limitation.

A. The commissioner, with the approval of the State Board of Education, shall determine geographic isolation if a unit is located an unreasonably long distance from another unit or school facility or is situated in a location which has unique problems in transporting students to another school unit.

B. If the unit is declared to be geographically isolated under paragraph A, the commissioner shall adjust the elementary and secondary per pupil allocation to that unit to meet the educational needs of that unit.

C. The geographic isolation adjustment shall not exceed the amounts expended by the unit in the base year which were in excess of the basic elementary and secondary per pupil operating rates in the year of allocation.

B. A unit shall receive a minimum allocation computed by multiplying the elementary or secondary pupil enrollment on October 1st in the year of allocation by the state average elementary or secondary adjusted per pupil operating rate respectively or the actual cost of tuition payment in the year of allocation, whichever is less, if it is not operating an elementary school or a secondary school and has 25 pupils or less in the kindergarten through grade 8 during the school year immediately prior to the year of allocation.

C. The small unit subsidy adjustment shall guarantee a minimum subsidy payment for operating costs to those units which qualify and it shall be made only after the adjustments in subsections 1 through 7 have been made.

8. Small unit subsidy adjustments; legislative intent. A unit may qualify for one of the following small unit subsidy adjustments.

A. A unit shall receive a minimum allocation for operating costs equal to $5/3$ of the state average elementary teachers' salary in the school year immediately prior to the year of allocation as determined by the commissioner, if it is operating an elementary school with 25 pupils or less in kindergarten through grade 8 during the school year immediately prior to the year of allocation.

MARYLAND

No special provisions for small rural and/or isolated schools.

MASSACHUSETTS

No special provisions for small rural and/or isolated schools.

MICHIGAN

No special provisions for small rural and/or isolated schools.

MINNESOTA

The following sparsity aid provisions were effective for the 1979-80 school year. This year, sparsity aid concepts have been incorporated into the "replacement aid" category. The formulas for replacement aid are complex. However, the general concept is that the state should provide aid to districts based on two criteria--student enrollment and size of the district. Where geographic distances preclude consolidation or pairing, additional state funds are needed to support quality rural education. (Phil Miller, Education Finance Specialist, Minnesota Department of Education.)

Sparsity aid provisions, as contained in Laws of Minnesota for 1979, 124.224 Sparsity Aid, are summarized below.

Eligibility

A high school qualifies for sparsity aid if (1) it has a "secondary average daily membership" of less than 500 in the year for which the aid is to be paid, and (2) it has an "isolation index" of greater than 18. The key terms are defined as follows:

(b)(i) In a school district with only one high school, "secondary average daily membership" means the average daily membership of resident pupils in grades seven through twelve, as defined in section 124.17, subdivision 2;

(ii) In a school district with more than one high school, "secondary average daily membership" for a particular high school means the product of the number of resident pupils enrolled in grades seven through twelve in average daily membership in that high school, as defined in section 124.17, subdivision 2, times the ratio of six to the number of grades in that high school.

(c) "Attendance area" means the quotient of the total surface area of a district divided by the number of high schools in the district.

(d) "Isolation index" means the sum of

(i) the distance measured by the usual traveled routes between a particular high school in a district and the nearest other high school, plus

(ii) the square root of one-half the attendance area.

An elementary school is eligible for sparsity aid if it enrolls fewer than 20 pupils, and if it is at least 50 miles by the usual traveled routes from the nearest other Minnesota elementary school.

Assistance

Aid to districts with qualifying high schools is as follows:

Subd. 3. QUALIFICATION. To qualify for aid under subdivision 4, a district must have at least one qualifying high school in the year for which the aid is to be paid.

Subd. 4. COMPUTATION. A district which qualifies for aid under subdivision 3 shall receive an amount of aid equal to the sum of the amounts determined by computing the following product for each qualifying high school in the district:

(a) the foundation aid formula allowance for the school year, multiplied by

(b) the secondary average daily membership, multiplied by

(c) the quotient obtained by dividing (1) the remainder of 500 minus the secondary average daily membership by (2) the sum of 500 plus the secondary average daily membership, multiplied by

(d) the quotient obtained by dividing (1) the remainder of the isolation index minus 18 by (2) the isolation index.

For each qualifying elementary school, the operating school district "shall receive an amount equal to the foundation aid formula allowance times the number of pupils enrolled in that school in addition to all other aids the district is entitled to."

MISSISSIPPI

No special provisions for small rural and/or isolated schools.

MISSOURI

No special provisions for small rural and/or isolated schools.

MONTANA

From the Montana Code:

20-9-318

EDUCATION

(2) For a secondary school having an ANB of more than 24 pupils, the maximum \$2,465 shall be decreased at the rate of \$13.45 for each additional pupil until the ANB shall have reached a total of 40 such pupils.

(3) For a school having an ANB of more than 40 pupils, the maximum of \$2,250 shall be decreased at the rate of \$13.45 for each additional pupil until the ANB shall have reached 100 pupils.

(4) For a school having an ANB of more than 100 pupils, a maximum of \$1,443 shall be decreased at the rate of \$2.25 for each additional pupil until the ANB shall have reached 200 pupils.

(5) For a school having an ANB of more than 200 pupils, the maximum of \$1,218 shall be decreased by \$1.24 for each additional pupil until the ANB shall have reached 300 pupils.

(6) For a school having an ANB of more than 300 pupils, the maximum of \$1,095 shall be decreased at the rate of 23 cents until the ANB shall have reached 600 pupils.

(7) For a school having an ANB over 600 pupils, the maximum shall not exceed \$1,027 per pupil.

(8) The maximum per pupil for all pupils (ANB) and for all high schools shall be computed on the basis of the amount allowed herein on account of the last eligible pupil (ANB). All high schools and junior high schools which have been approved and accredited as junior high schools, operated within the incorporated limits of a city or town, shall be treated as one school for the purpose of this schedule.

History: En. 75-6905 by Sec. 255, Ch. 5, L. 1971; amd.Sec. 1, Ch. 404, L. 1971; amd.Sec. 1, Ch. 400, L. 1973; amd.Sec. 1, Ch. 345, L. 1974; amd.Sec. 1, Ch. 347, L. 1974; amd.Sec. 1, Ch. 518, L. 1975; amd.Sec. 1, Ch. 505, L. 1977; R.C.M. 1947, 75-6905(7) thru (9).

20-9-318. Elementary school maximum budget schedule for 1978-79 and succeeding years. (1) For each elementary school having an ANB of nine or fewer pupils, the maximum shall be \$11,113 if said school is approved as an isolated school.

(2) For schools with an ANB of 10 pupils but less than 18 pupils, the maximum shall be \$11,113 plus \$464.40 per pupil on the basis of the average number belonging over nine.

(3) For schools with an ANB of 18 pupils and employing one teacher, the maximum shall be \$15,292 plus \$464.40 per pupil on the basis of the average number belonging over 18, not to exceed an ANB of 25.

(4) For schools with an ANB of 18 pupils and employing two full-time teachers, the maximum shall be \$24,415 plus \$290.90 per pupil on the basis of the average number belonging over 18, not to exceed and ANB of 50.

(5) For schools having an ANB in excess of 40, the maximum on the basis of the total pupils (ANB) in the district for elementary pupils will be as follows:

(a) For a school having an ANB of more than 40 and employing a minimum of three teachers, the maximum of \$1,079 shall be decreased at the rate of \$1.05 for each additional pupil until the total number (ANB) shall have reached a total of 100 pupils.

(b) For a school having an ANB of more than 100 pupils, the maximum of \$1,016 shall be decreased at the rate of 96 cents for each additional pupil until the ANB shall have reached 300 pupils.

(c) For a school having an ANB of more than 300 pupils, the maximum shall not exceed \$824.60 for each pupil.

(6) The maximum per pupil for all pupils (ANB) and for all elementary schools shall be computed on the basis of the amount allowed herein on account of the last eligible pupil (ANB). All elementary schools operated within the incorporated limits of a city or town shall be treated as one school for the purpose of this schedule.

History: En. 75-6905 by Sec. 255, Ch. 5, L. 1971; amd.Sec. 1, Ch. 404, L. 1971; amd.Sec. 1, Ch. 400, L. 1973; amd.Sec. 1, Ch. 345, L. 1974; amd. Sec. 1, Ch. 347, L. 1974; amd.Sec. 1, Ch. 518, L. 1975; amd.Sec. 1, Ch. 505, L. 1977; R.C.M. 1947, 75-6905(10) thru (15).

20-9-319. High school maximum budget schedule for 1978-79 and succeeding years. (1) For each high school having an ANB of 24 or fewer pupils, the maximum shall be \$63,308.

(2) For a secondary school having an ANB of more than 24 pupils, the maximum \$2,638 shall be decreased at the rate of \$14.39 for each additional pupil until the ANB shall have reached a total of 40 such pupils.

(3) For a school having an ANB of more than 40 pupils, the maximum of \$2,408 shall be decreased at the rate of \$14.39 for each additional pupil until the ANB shall have reached 100 pupils.

(4) For a school having an ANB of more than 100 pupils, a maximum of \$1,544 shall be decreased at the rate of \$2.41 for each additional pupil until the ANB shall have reached 200 pupils.

(5) For a school having an ANB of more than 200 pupils, the maximum of \$1,304 shall be decreased by \$1.32 for each additional pupil until the ANB shall have reached 300 pupils.

(6) For a school having an ANB of more than 300 pupils, the maximum of \$1,171 shall be decreased at the rate of 24 cents until the ANB shall have reached 600 pupils.

(7) For a school having an ANB over 600 pupils, the maximum shall not exceed \$1,098 per pupil.

(8) The maximum per pupil for all pupils (ANB) and for all high schools shall be computed on the basis of the amount allowed herein on account of the last eligible pupil (ANB). All high schools and junior high schools which have been approved and accredited as junior high schools, operated within the incorporated limits of a city or town, shall be treated as one school for the purpose of this schedule.

History: En. 75-6905 by Sec. 255, Ch. 5; L. 1971; amd.Sec. 1, Ch. 404, L. 1971; amd.Sec. 1, Ch. 400, L. 1973; amd.Sec. 1, Ch. 345, L. 1974; amd. Sec. 1, Ch. 347, L. 1974; amd.Sec. 1, Ch. 518, L. 1975; amd.Sec. 1, Ch. 505, L. 1977; R.C.M. 1947, 75-6905(16) thru (18).

20-9-320. Maximum general fund budget for junior high school... (1)
The general fund budget amount for an approved and accredited junior high school shall be prorated between the elementary district general fund budget and the high school district general fund budget in the following manner:

(a) determine the per-ANB schedule amount for the school, as defined by 20-9-317 and 20-9-319, from the high school schedule;

(b) calculate the ANB for the regularly enrolled full-time pupils enrolled in the 7th and 8th grades of the junior high school;

(c) multiply the per-ANB schedule amount determined in subsection (1)(a) by the ANB calculated in subsection (1)(b) to determine the authorized general fund budget amount which shall be available for the elementary district general fund budget; and

(d) subtract the amount determined in subsection (1)(c) from the total authorized general fund budget amount for the school to determine the authorized general fund budget amount which shall be available for the high school district general fund budget.

NEBRASKA

Eligibility

In Nebraska, a population density of less than four persons per square mile, as determined by the most recent decennial census, is the criterion for additional financial aid.

Assistance

Nebraska Code, Sec. 79-1336.

(2) When the population density in any county is less than four persons per square mile, as determined from the most recent federal decennial census, the total financial support under subdivision (1) of this section insured for each district in that county shall be increased by the following percentages: (a) if the population density is three or more but less than four persons per square mile, ten per cent; (b) if the density is two or more but less than three persons per square mile, twenty per cent; (c) if the density is one or more but less than two persons per square mile, thirty per cent; and (d) if the density is less than one person per square mile, forty per cent; Provided, any school district within a qualifying county showing a density greater than provided in this subdivision shall not qualify for such percentage increases. (Laws 1967.)

NEVADA

Eligibility

Enrollment and pupil population sparsity form the bases for providing special assistance to small schools in Nevada.

Assistance

The "Nevada Plan for Support of Public Education, 1981-83 Biennial Request" sets the following guidelines:

(1) Equalized Basic Support.

This part of the basic support guarantee is established for each district by applying a district ratio to the statewide per pupil monetary amount established as equalized basic support. The ratios for each district are determined as follows:

Teacher allocations are determined from counts of pupils in each school attendance area within a local school district in accordance with tables adopted by the State Board of Education. The tables allow for increased teacher allocations in school attendance areas where pupil population is sparse and for a lesser number of teacher allocations in densely populated areas. This is based on the premise that where pupil population is sparse, group service units must be maintained for small numbers of pupils, while in more densely populated areas, group service units can be maintained more efficiently by serving larger numbers of pupils in a group.

In addition to teacher allocations, each district is granted allocations for other certified staff on the basis of pupil enrollment area within a school attendance area. Like teacher allocations, this is also determined from tables adopted by the State Board of Education and similar consideration for granting additional allocations to sparsely populated areas is included in the calculations.

Once the teacher and other certified staff allocations are determined, pre-established monetary amounts are applied to pupil counts for kindergarten (weighted at .6), elementary and secondary pupils, and total certified employee allocations (teacher and other certified staff combined), which makes possible the determination of a weighted monetary value per pupil for each local school district.

A statewide monetary value per pupil is established by adding the values for all districts and dividing the total by the statewide enrollment. The statewide monetary value per pupil is assigned a ratio value of 1.000 and each district is assigned a ratio value equivalent to their monetary value per pupil as compared to the statewide total.

NEW HAMPSHIRE

No special provisions for small rural and/or isolated schools.

NEW JERSEY

No special provisions for small rural and/or isolated schools.

NEW MEXICO

Eligibility

Low enrollment is New Mexico's eligibility requirement, with special assistance given to approved public schools with ADM (average daily membership) of less than 200, and to school districts with a total ADM of less than 4,000.

Assistance

Section 22-8-23, New Mexico Code.

A. . . . The number of additional program units to which a school district is entitled under this subsection is the sum of elementary-junior high units and senior high units computed in the following manner:

Elementary-Junior High Units

$$\left(\frac{200-ADM}{200}\right) \times 1.0 \times ADM = \text{Units}$$

where ADM is equal to the average daily membership of an approved elementary or junior high school including early childhood education full-time equivalent average daily membership but excluding special education Class C and Class D average daily membership;

Senior High Units

$$\left(\frac{200-ADM}{200}\right) \times 2.0 \times ADM = \text{Units}$$

where ADM is equal to the average daily membership of an approved senior high school excluding special education Class C and Class D average daily membership.

B. A school district with total ADM of less than 4,000 including early childhood education full-time equivalent ADM and special education ADM is eligible for additional program units. The number of additional program units to which a district is entitled under Subsection B of this section is the number of district units computed in the following manner:

District Units

$$\left(\frac{4000-ADM}{4000}\right) \times 0.15 \times ADM = \text{Units}$$

where ADM is equal to the total district average daily membership including early childhood education full-time equivalent average daily membership and special education average daily membership.

NEW YORK

No special provisions for small rural and/or isolated schools.

NORTH CAROLINA

Eligibility

Enrollments and isolation are the criteria for special assistance, with elementary schools of 100 pupils or less and high schools of 60 pupils or less being eligible, providing their "geographic locations prohibit consolidation."

Assistance

Under a flexible provision, the State Board of Education may make additional allotments to small schools.

North Carolina Administrative Code 3.0600.

(E) Upon request of the superintendent of an administrative unit, additional allotments may be made by the State Board of Education for small elementary schools of 100 pupils or less and small high schools of 60 pupils or less whose geographic locations prohibit consolidation.

NORTH DAKOTA

No special provisions for small rural and/or isolated schools. At this writing, a bill for supplemental payments to small, isolated, but necessary schools is scheduled to be considered by the 1981 Legislature.

OHIO

No special provisions for small rural and/or isolated schools.

OKLAHOMA

Eligibility

Oklahoma's special assistance is for transportation only, and eligibility is determined by a "density figure" calculated "by dividing the average daily haul for the next preceding year by the area served for the same period."

(Oklahoma statutes.)

OREGON

Eligibility

Special assistance is provided by Oregon to a "school which is approved as qualified for a small school correction," based on enrollment and isolation or population sparsity.

Oregon Statutes 327.075.

(b) A school may qualify for a small school correction if the average daily membership in grades one through eight or in grades 9 through 12 is below 100 and the State Board of Education, after receiving not later than August 1 a petition from the school district board, determines that the school's continued existence is justified because of physiographic conditions which make transportation to another school not feasible or because of sparsity of population. Where sparsity of population is the determining factor, no elementary school shall qualify if it is within 10 miles by the nearest traveled road from another elementary school and no high school shall be considered if it is located within 15 miles by the nearest traveled road from another high school

(c) The amount of the small school correction shall be adjusted annually by the State Board of Education in a manner consistent with the change in the basic education program level.

(d) The amount of the small school correction shall be added to the cost of the basic education program for the school district.

Assistance

The small school correction is established by regulation, primarily in terms of the number of teachers allowed, as follows:

Oregon Administrative Rules 581-23-105.

Small School Correction Computation

§ 581-23-015 (1) Definitions:

(a) Teachers: The number of teachers allowed for a specific ADM as determined from Table I or II as applicable.

(b) Limit: The statewide average of the Total Estimated Net Operating Expenditures, for the preceding year, of all common and union high districts of the state divided by the Total Estimated Resident ADM, for the preceding year, of the same districts.

(2) The small school correction for a school with grades 1-8 shall be computed as follows:

(a) Multiply the limit by the factor 100.

(b) Divide the product by the factor 4.

(c) Multiply the quotient by the teachers from Table I.

$$\frac{(\text{Limit} \times 100)}{(4)} \times \text{Teachers} = \text{Small School Correction}$$

(3) The small school correction for a school with grades 9-12 shall be computed as follows:

(a) Multiply the limit by the factor 100.

(b) Divide the product by the factor 5.

PENNSYLVANIA

Eligibility

Population sparsity constitutes the basis for special assistance in Pennsylvania. "'Sparsity Factor' shall be assigned for those districts whose population is less than fifty (50) per square mile as determined by the Secretary of Education from the most recent records of the United States Census Bureau." Sec. 2501(17), Pennsylvania Public School Code of 1949, as amended.

"School districts that have a population of at least 50 per square mile but less than 100 per square mile, as determined by the Secretary of Education from the most recent records of the Census Bureau, shall qualify for a modified sparsity payment." Chapter V, "Sparsity Factor," Department of Education regulations.

Assistance

The amount paid for the sparsity factor is for "expenditures in excess of \$400 per subsidy-weighted average daily membership, not to exceed \$250."

RHODE ISLAND

No special provisions for small rural and/or isolated schools. However, Arthur R. Pontarelli, Acting Commissioner, points out in his response:

"The Rhode Island law under which state aid for school operations is calculated permits the sort of adjustment you are studying through administrative regulation. Only two of Rhode Island's 40 local school districts in recent years were eligible for any adjustment. Other features of the state aid formula, however, made sure the level of state aid is appropriate and equitable so the

complicated regulation which permitted an adjustment to the pupil count of these districts was eliminated in 1979."

SOUTH CAROLINA

No special provisions for small rural and/or isolated schools.

SOUTH DAKOTA

Eligibility

Non-eligibility for general support funds, based on enrollment and isolation, qualifies small schools in South Dakota for special assistance. A school district is not eligible for general support funds if it has "operated a one-teacher rural school with an average daily membership of five or less pupils within five miles by publicly traveled roads of any other public elementary school in operation during the previous school fiscal years."

Also, a district is not eligible for high school general support funds if it "operated a secondary school during the previous school fiscal year with an average daily membership of less than thirty-five pupils enrolled in grades nine through twelve in such school; unless such secondary school was located over twenty miles from any other secondary school in operation; provided, however, that if a school district is operating an elementary program and is not eligible for state general support for secondary schools such ineligibility for state general support for secondary schools shall in no wise bar said district from receiving general support funds for its elementary grades if other requirements are met." 13-13-16 South Dakota Code.

Assistance

Consideration for small schools which are eligible is provided through (1) calculating classroom unit entitlements from factors which vary with average daily membership, and (2) allowing one classroom unit for each

one-teacher school and two classroom units for each two-teacher school regardless of enrollment. The following is from the South Dakota Code:

13-13-22. ELEMENTARY SCHOOL CLASSROOM UNIT ENTITLEMENT OF DISTRICTS. The classroom unit entitlement of a school district which operates an educational program for the lower grade pupils, which shall include grades kindergarten through eighth, shall be determined as provided in Table 1 of this section.

TABLE 1		
1	2	3
Total average daily membership of lower grade school pupils in the school district	Multiplicand	Addition Factor Constant
00.000 through 46.506	+0.012042	+1.901461
46.507 through 181.534	+0.044834	+0.376446
181.535 through 226.300	+0.014995	+5.772454
226.301 and over	+0.040503	+0.000000

A one-teacher school shall be entitled to only one classroom unit and a two-teacher school shall be entitled to only two classroom units.

13-13-23. HIGH SCHOOL CLASSROOM UNIT ENTITLEMENT OF DISTRICTS. The classroom unit entitlement of a school district which operates an educational program for upper grade pupils, which shall include grades nine through twelve, shall be determined as provided in Table 2 in this section.

TABLE 2		
1	2	3
Total average daily membership of upper grade school pupils in the school district	Multiplicand	Addition Factor Constant
00.000 through 96.269	+0.042086	+2.149407
96.270 through 299.077	+0.047712	+1.607799
299.078 through 491.588	+0.033150	+5.962965
491.589 and over	+0.045280	+0.000000

13-13-24. TOTAL CLASSROOM UNITS IN SCHOOL DISTRICT - ADDITION FOR ADMINISTRATION AND SUPERVISION. The total number of classroom units to which an eligible school district is entitled shall be the sum of the number of lower grade classroom units obtained in Table 1 in § 13-13-22, plus thirteen percent of this sum for administration and supervision, and the number of upper grade classroom units obtained in Table 2 in

§ 13-13-23, plus thirteen percent of this sum for administration and supervision, plus two classroom units for each two-teacher rural school and one classroom unit for each one-teacher rural school operated by the district. Computations as indicated above shall be determined to the nearest thousandth decimal point.

Taken from "The Minimum Foundation Program 1980-1981."

TENNESSEE

No special provisions for small rural and/or isolated schools.

TEXAS

Eligibility

Texas applies the criteria of sparsity and enrollment to determine eligibility for small school aid. The three formulas used all relate to school districts with fewer than 1,000 in average daily attendance. One formula applies to a district which contain at least 300 square miles and has not more than 1,000 ADA. Another is for any district which contains less than 300 square miles and has not more than 1,000 ADA. The third establishes minimum staffing for small schools in districts with fewer than 1,000 ADA.

Assistance

Texas Education Code.

§16.102. Education Program Personnel

(c) Each school district shall be allotted personnel units on the basis of the district's average daily attendance in education programs as follows:

(1) One personnel unit for each 185 students in average daily attendance in kindergarten and grades 1 through 8.

(2) One personnel unit for each 21 students in average daily attendance in grades 4 through 6.

(3) One personnel unit for each 20 students in average daily attendance in grades 7 through 9, and

(4) One personnel unit for each 18 students in average daily attendance in grades 10 through 12.

(d) The personnel unit allotment for a school district which contains at least 300 square miles and which has not more than 1,000 students in average daily attendance in its education program shall be adjusted according to the following formula:

$$[1 + (1000 - \text{ADA}) (.000455)] \times \text{PU} = \text{APU}$$

where PU is the district's personnel units determined in accordance with Subsection (c) of this section; and APU is the district's adjusted personnel units.

(e) The personnel units allotment for a school district which contains less than 300 square miles and has not more than 1,000 students in average daily attendance in its education program shall be adjusted according to the following formula:

$$[1 + (1000 - \text{ADA}) (.0003)] \times \text{PU} = \text{APU}$$

where PU is the district's personnel units determined in accordance with Subsection (c) of this section; and APU is the district's adjusted personnel units.

(f) Notwithstanding Subsections (d) and (e) of this section, a school district that has 1,000 or fewer students in average daily attendance shall be allotted not less than 12 personnel units if it offers a kindergarten through grade 12 program and has a prior year average daily attendance of at least 90 students or is 30 miles or more by bus route from the nearest high school district. A district offering a kindergarten through grade 8 program whose prior year's average daily attendance was at least 50 students or is 30 miles or more by bus route from the nearest high school district shall be allotted not less than 7.2 personnel units. Not less than 4.2 personnel units shall be allotted if a district offers a kindergarten through grade 6 program and has a prior year's average daily attendance of at least 40 students or is 30 miles or more by bus route from the nearest high school district. In addition, each school district that has 1,000 or fewer students in average daily attendance shall be allotted .6 personnel unit to be used cooperatively with other districts to provide support services necessary to meet accreditation standards.

Regulation re Section 16.102(n)

Minimum Staffing

The new amendment provides for minimum staffing in districts with 1,000 or fewer average daily attendance (ADA) provided:

K-12 grade program - 90 ADA or 30 miles or more by bus route from the nearest high school district
12 units

K-8 grade program - 50 students or 30 miles or more by bus route from the nearest high school district
7.2 units

K-6 grade program - 40 students or 30 miles or more by bus route from the nearest high school district
4.2 units

Brian L. Wilson, Director, Division of Information Analysis, Texas Education Agency, illustrates and summarizes the Texas provisions in his response:

"Specifically, subsections (d), [sparsity], (e) [small schools], and (n) [minimum staffing], of this section deal with special funding formulas for school districts with not more than 1,000 students in average daily attendance (ADA). Also enclosed are some administrative instructions for 16.102(n) describing the implementation of this subsection.

"Subsection (c) of 16.102 described the allotment of personnel units (PU's) for each district, based on that district's ADA. For districts with not more than 1,000 ADA the number of PU's is then adjusted by the formulas given in subsection (d), (e) or (n) based upon which criteria the district meets.

"For example, if a particular school district has 100 students in ADA in each of the four grade spans as described in subsection (c), the number of PU's allotted is 20.71 (5.40 PU's GR K-3, 4.76 PU's GR 4-5, 5.00 PU's GR 7-9, 5.55 PU's GR 10-12). If the particular school district contains at least 300 square miles, the formula in subsection (d) is used. By setting ADA to 400 and PU to 20.71, the number of adjusted personnel units allotted is 26.36. If, however, the school district contains less than 300 square miles, the formula in subsection (e) is used. ADA and PU's have the same values as above; therefore, the allotted PU is 24.44. This district would not meet the criteria of subsection (n) since the district's allocation is greater than 12 personnel units."

UTAH

Eligibility

The State Board of Education may classify a school as a "necessarily existent small rural school," based primarily on its isolation. Utah Code, Section 53-7-21(3).

Assistance

Extra Weighted Pupil Units (WPU's) are allocated to each school classified as a necessarily existent small rural school, according to the following formulas from Utah Code, Section 53-7-21(3):

The additional units for schools so classified as necessarily existent small schools shall be computed in accordance with the following schedule; except, that the units computed for each school shall be reduced by the number of units equal to the number of ADA in that school:

Elementary Small School Formula:

Multiply the number of kindergarten pupils in average daily attendance by .55 and add the pupils in average daily attendance in grades 1 through 6 and apply that sum to the appropriate school category below:

Average Daily Attendance By School Size

Number of Weighted Pupil Units

5 up to 13	27
13 up to 21	40
21 up to 31	53
31 up to 51	$53 + (1.4) \text{ (ADA minus 30)}$
51 up to 91	$81 + (1.2) \text{ (ADA minus 50)}$
91 up to 111	$129 + (1.0) \text{ (ADA minus 90)}$
111 up to 165	$149 + (0.3) \text{ (ADA minus 110)}$

Junior High and Middle School Small School Formula:

Average Daily Attendance By School Size

Number of Weighted Pupil Units

0 up to 41	Number of pupils multiplied by 2.0
41 up to 81	$80 + (1.5) \text{ (ADA minus 40)}$
81 up to 151	$140 + (1.4) \text{ (ADA minus 80)}$
151 up to 251	$238 + (1.0) \text{ (ADA minus 150)}$
251 up to 350	$338 + (0.12) \text{ (ADA minus 250)}$

Senior High Small School Formula:

Average Daily Attendance
By School Size

Number of
Weighted Pupil Units

0 up to 76
76 up to 126
126 up to 186
186 up to 251
251 up to 375

Number of pupils multiplied by 2.0
150 + (1.6) (ADA minus 75)
230 + (1.1) (ADA minus 125)
296 + (1.0) (ADA minus 185)
361 + (.112) (ADA minus 250)

Six Year Small School Formula (Grades 7-12):

Average Daily Attendance
By School Size

Number of
Weighted Pupil Units

0 up to 81
81 up to 161
161 up to 251
251 up to 650

Number of pupils multiplied by 2.0
(minimum total weighting of 27)
160 + (1.4) (ADA minus 80)
272 + (1.0) (ADA minus 160)
362 + (0.72) (ADA minus 250)

(4) The number of weighted pupil units for handicapped pupils, including pupils provided for in section 53-18-3, shall be provided for the direct cost of programs for.

VERMONT

No special provisions for small rural and/or isolated schools.

VIRGINIA

No special provisions for small rural and/or isolated schools; William H. Cochran, Deputy Superintendent of Public Instruction, notes in his response, however; "Our formula for equalization gives some advantage to rural schools in the determination of local ability."

WASHINGTON

The ECS report states that: Remote and necessary elementary schools less than 100 pupils; high schools less than 250 pupils. Additional certificated staff units allocated ranging from 1.0 to 2.5 depending on grade level and required student/staff ratio.

WEST VIRGINIA

No special provisions for small rural and/or isolated schools.

WISCONSIN

No response.

WYOMING

Eligibility

One-teacher schools are eligible for one classroom unit of funding if located outside city limits. Isolated schools also receive special assistance.

Assistance

Each one-teacher school is eligible for one classroom unit of funding, whether there is one student or twenty students.

For schools classified as isolated, "isolation payments are authorized at \$75 per month per student with 75% reimbursed through the Foundation Program."

ABOUT THE AUTHOR

Lyle Wright is Director of Western Educational Services, Centerville, Utah -- a consulting firm he founded in 1973, and works as a planning consultant, technical writer, and publisher. Previous publications include a Directory of Resources for Educational Planning and Management; Survival of Public Schools; Educational Needs Assessment (with others), and Developing Comprehensive Planning Capability in State Education Agencies.

Mr. Wright has taught at the elementary, secondary, and postsecondary levels. He served as Associate Superintendent of Alaska's State-Operated School System (which has since been divided into 21 districts); at the intermediate level as Planning Associate for the North Bay PACE Center (Napa, California) and as Administrative Coordinator in the Marin County Schools Office (Corte Madera, California), and as President of the Inupiat University of the Arctic at Barrow, Alaska.

Recent projects include serving as planner for Garfield County School District's project to develop individual education in Ticaboo -- a uranium-based town less than two years old; working with the Utah State Office of Education in small-school program development, program design for statewide planning and for development of comprehensive planning capability in school districts, and planning for the impact of rapid growth caused by energy development and defense installations; preparing guidelines for planning in Community Action Programs; and working with Utah's four regional service centers to plan for services and funding.

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